Atty

Kruthers, Heather H. (for Petitioner/Administrator Public Administrator)

(1) First and Final Account and Report of Administration and (2) Petition for Allowance of Ordinary and Extraordinary Commissions and Fee and for (3) Distribution [Prob. C. 10800, 10810, 10951, 11600, 11850(a)]

Ь	OD: 12/1/2005		PUBLIC ADMINIST		Administrator is	NEEDS/PROBLEMS/
	, , ,		petitioner.	KAIOK,	, Administrator, is	COMMENTS:
			, , , , , , , , , , , , , , , , , , , ,			
			Account period:	12/1/20	005 – 5/31/2011	1. This estate is the
С	ont. from		'			beneficiary of the
	Aff.Sub.Wit.		Accounting	-	\$96,903.42	Frances L. Carlson Living Trust (page 2 of
√	Verified		Beginning POH		\$81,147.20	this calendar).
√	Inventory		Ending POH	-	\$40,170.48	Disbursement schedule includes a
√	PTC		Administrator	-	\$3,868.72 (statutory)	disbursement for Home
√	Not.Cred.		Administrator X/C	`	\$445.20 (per Local	Insurance 9/26/08 - 3/26/08 in the amount
✓	Notice of Hrg		Rule for sale of p			of \$1,985.15. The
√	Aff.Mail	W/	preparation of to	ixes)		disbursement schedule in The Frances L.
	Aff.Pub.		A 11		62 0/0 70 /startutours	Carlson Living Trust
	Sp.Ntc.		Attorney	-	\$3,868.72 (statutory)	includes a
	Pers.Serv.		Bond fee	_	\$1,332.43 (ok.)	disbursement for House
	Conf. Screen		bond lee	-	\$1,332.43 (OK.)	Insurance (same
✓	Letters 5/10/	/06	Court fees	_	\$342.00 (filing fee	property) 9/29/08 – 9/26/09 in the amount
	Duties/Supp		and certified cop	oies)		of \$1,987.07. It appears
H	Objections					that these payments
	Video Receipt		Closing reserve	-	\$1,500.00	are for the same time frame and could be a
	CI Report		Will devises the e	ctate to	Decedent's Living	duplicate charge.
✓	9202		Trust. Petitioner re		•	
√	Order				ne beneficiaries of	
	Aff. Posting		the trust, rather th	nan rec	juiring the opening of	Reviewed by: KT
	Status Rpt		a trust case mere	ely for d	listribution.	Reviewed on: 5/7/12
	UCCJEA					Updates:
	Citation		Proposed distribu	ition is t	to:	Recommendation:
✓	FTB Notice		<u>.</u>			File 1 - Carlson
			•		or of Planned Giving	
			University of RedI	ands	#1.4.000.71	
				-	\$14,208.71	
			Beta-Sigma-Phi	-	\$14,208.70	

Atty

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Kruthers, Heather H (for Petitioner/Trustee Public Administrator)

(1) First and Final Account and Report of Trustee, (2) Petition for Allowance of Compensation to Trustee and Attorney, (3) Final Distribution

(Prob. C. 15688, 16062, 16063)

		PUBLIC ADMINISTRA	ATOR, Tr	ustee, is petitioner.	NEEDS/PROBLEMS/ COMMENTS:
		Account period: 9,	/8/2006	- 5/15/2011	
Co ✓	nt. from Aff.Sub.Wit. Verified	Accounting Beginning POH Ending POH	- - -	\$105,009.21 \$90,058.39 \$75,563.18	1. This beneficiary of this estate is the Frances L. Carlson Living Trust (page 1 of this calendar).
	Inventory	Trustee	-	\$3,947.11 (statutory)	Disbursement schedule
	PTC	Two sets a V/O		C1040 00 /m on loo ol	includes a
	Not.Cred.	Trustee X/O Rule for sale of real		\$1248.00 (per Local ty and preparation of	disbursement for Home Insurance 9/29/08 –
✓	Notice of Hrg	taxes.)	proper	ry and preparation of	9/26/09 in the amount of \$1,987.07 . The
✓	Aff.Mail W/	Attorney	-	\$3,947.11 (statutory)	disbursement schedule
	Aff.Pub.				in the Estate of Edna
	Sp.Ntc.	Bond	-	\$1,181.34	Mildred Carlson
-	Pers.Serv.	Court fees	_	\$320.00 (filing fee)	includes a disbursement for
	Conf. Screen	Coon lees	-	3320.00 (IIIII IG 166)	House Insurance
	Letters	Petitioner states pui	rsuant [Decedent's Trust, her	9/26/08 -3/26/08 in the
	Duties/Sup	•		receive the assets if	amount of \$1,985.15
	p			vive her sister, but she	(same property). It
	Objections			a's estate is entitled to	appears that these
	Video	receipt of the trust of			payments are for the
	Receipt			nd Trusts, naming each I the same two entities.	same time frame and could be a duplicate
	CI Report			distributing this Trust to	charge.
	9202	Edna's estate to the		_	charge.
✓	Order	beneficiaries, Petitio	•		
	Aff. Posting	distribute directly to		·	Reviewed by: KT
	Status Rpt	beneficiaries.			Reviewed on: 5/8/12
	UCCJEA	_			Updates:
	Citation	Proposed distribut	ion is t	o :	Recommendation:
	FTB Notice	John G. Serbien, I University of Redic		r of Planned Giving	File 2 - Carlson
			-	\$31,512.32	
		Beta-Sigma-Phi	-	\$31,512.32	
<u>ш</u>		1			2

3 Sylvia Dauer (CONS/PE)

Atty

Case No. 08CEPR01182

O'Neill, Patricia B (for Petitioners/Co-Conservators Renee Dauer & Marjorie Dauer-Piper)

(1) Second Account and Report of Co-Conservators, Petition to Settle Account, an (2) for Allowance of Attorney's Fees (Prob. C. 1064, 2640)

Age: 86 years			RENEE DAUER , gra	nddaug	hter and Co-	NE	NEEDS/PROBLEMS/COMMENTS:	
DOB: 6/30/1925			Conservator of the	_	•			
			DAUER-PIPER , gran	nddaugl	hter and Co-	1.	Need receipt schedule.	
			Conservator of the	e Persor	and Conservator of	2.	Need property on hand	
			the Estate, are pe	titioners	•		schedule.	
Co	nt. from					3.	Estate includes real	
	Aff.Sub.Wit.		Account period:	3/1/2010	0 – 2/29/2012		property. Conservatee	
							resides in a care facility.	
✓	Verified		Accounting	-	\$112 <i>,</i> 487.11		Disbursement schedule	
	Inventory		Beginning POH	-	\$ 81,461.11		includes disbursements for	
	PTC		Ending POH	-	\$ 81,918.85		the real property. Court	
	Not.Cred.			(\$1,168.	.85 is cash)		may inquire as to the status	
1	Notice of						of the real property.	
	Hrg		Co-Conservator	-	not requested	4.	Need declaration re:	
1	Aff.Mail	W/				_	attorney fees.	
	Aff.Pub.		Attorney	-	\$800.00	5.	Need original billing	
			A 44		C205.00		statements for Horizon	
	Sp.Ntc.		Attorney Costs	-	\$395.00		Health and Subacute	
	Pers.Serv.		(filing fee)				Center [care facility where	
	Conf.		Dand		¢17,000,00		the conservatee resides]	
	Screen		Bond	-	\$16,000.00		pursuant to Probate Code §2620.	
	Letters					4	Order does not comply	
	Duties/Supp		Patitionars state th	ne conse	ervatee owns two life	0.	with Local Rule 7.6.1. All	
	Objections		insurance policies				orders settling accounts	
	Video		•		30 and the other has		shall contain a statement	
	Receipt		a cash surrender				as to the balance of the	
✓	CI Report		beneficiary on bo		•		estate on hand,	
	9202		conservatee's de	•			specifically noting the	
1	Order		Petitioners reques				amount of cash in the	
			the beneficiary de		·		balance.	
			Petitioners as the I	_				
			have access to th	ie death	n benefits to pay for			
			the Conservatee'	s funera	I expenses when the			
	Aff. Posting		time comes.			Re	viewed by: KT	
	Status Rpt					Re	eviewed on: 5/8/12	
	UCCJEA		Please s	ee addi	tional page		odates:	
	Citation					Re	commendation:	
	FTB Notice					File	e 3 - Dauer	

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3 (additional page) Sylvia Dauer (CONS/PE)

Case No. 08CEPR01182

Petitioners state commencing January 2011, Petitioners and their mother Mary Dauer, have each been depositing \$100 into an account held by them to pay for Conservatee's expenses not covered by Conservatee's income. The following expenses are paid from this account as they come due:

Kaiser Permanente (health insurance) \$81.00 State Farm (homeowners insurance) \$78.58

PG&E (for conservatee's residence) \$12.00 (average)

Biola Community Service (water) \$50.75 DiBuduo and Defendis (probate bond) \$100.00/year

Petitioners request that they be reimbursed for the funds deposited and used for that purpose upon the sale of the Conservatee's residence. An accounting of those funds would be provided to the court.

Petitioner prays for an Order:

- 1. Approving, allowing and settling the Second Account;
- 2. Ratifying, confirming and approving all acts and transactions of the conservator relating to conservatorship;
- 3. Allow Petitioners to change the beneficiary designation on the insurance policies to Petitioners;
- Order Petitioners and Mary Dauer to be reimbursed for payments made from their personal funds for the care of Conservatee upon the sale of the residence and upon the presentation of an accounting, and
- 5. Authorizing the payment of attorney fees and costs.

Court Investigator Jennifer Daniel's Report filed 4/9/12.

4 Janet Ruth Hartley (Estate)

Kruthers, Heather H Atty

Amended First and Final Account and Report of Administrator and Petition for Allowance of Ordinary and Extraordinary Commissions Fees and for Distribution [Prob. C. 9202, 10800, 10810, 10951, 11600, 11850(a)]

Case No. 10CEPR00428

and

_	D: 3/30/10	PUBLIC ADMINISTRATOR,		NEEDS/PROBLEMS/COMMENTS:
	-,, -	is petitioner.	, (31111111311 4101)	
		Account period: 8/18/10	- 3/26/12	
Со	nt. from			
	Aff.Sub.Wit.	_	\$188,300.00	
✓	Verified	Beginning POH -		
✓	Inventory	Ending POH -	\$132,879.51	
✓	PTC	Administrator -	\$6,319.00	
	Not.Cred.	(statutory)		
✓	Notice of	A chaoininteachau V (O	62.040.00 /	
-	Hrg W	Administrator X/O - Local Rule for sale of rea	• •	
—	Aff.Pub.	of personal property and		
1	Sp.Ntc. W	of taxes)		
	Pers.Serv.	Attorney -	\$6.319.00	
	Conf.	(statutory, payable \$3,81	• •	
	Screen 8/25/10	Counsel and \$2,500.00 to	Susan	
✓		Moore.)		
	Duties/Supp Objections	Bond fee -	\$588.44 (o.k.)	
	Video	Bond lee -	3566.44 (O.K.)	
	Receipt	Court fees -	\$204.00	
	CI Report	(certified copies)		
✓	9202			
✓	Order	Closing -	\$1,000.00	
	Aff. Posting	Distribution, pursuant to in	ntestate	Reviewed by: KT
	Status Rpt	succession, is to:	illesidie	Reviewed on: 5/8/12
	UCCJEA			Updates:
<u> </u>	Citation FTB Notice	Robert Hartley -	\$38,400.35	Recommendation:
√	FID NOIICE	David Guy -	\$25,600.24	File 4 – Hartley
		,	\$25,600.24	
		Melody McCombs -	\$25,600.24	

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Atty

Towne, Bruce Hudson (for Petitioner/Administrator Jeffrey Martin)

(1) First and Final Report of Administrator, (2) Petition for Final Distribution and (3) Allowance of Compensation for Statutory Commissions and for Statutory and Extraordinary Attorney's Fees

DO	D: 9/9/2010		JEFFREY MARTIN	I, Admir	nistrator, is	NE	EDS/PROBLEMS/COMMENTS:
			petitioner.		ŕ	1.	Need property on hand schedule. California Rules of
			Accounting is wa	ived.			Court, Rule 7.651.
Coi	nt. from						
H	Aff.Sub.Wit.		1 & A	-	\$98,827.23	2.	Need statement re: Costs
✓						3.	Need receipt for preliminary
✓	Inventory		Administrator	-	\$3,953.08		distribution.
✓	PTC		(statutory)			4.	Petition does not contain a
✓	Not.Cred.		Attorney	_	\$3,953.08		statement regarding Probate Code §216 and 9202(b) re: notice
✓	Notice of Hrg		(statutory)		γο,οοοίοο		to the Director of Victims Compensation and Government
✓	Aff.Mail	W/	Costs	_	\$416.00		Claims Board.
	Aff.Pub.		Costs		7410.00	_	
✓	Sp.Ntc.	W/	Distribution, purs	suant to	intestate	5.	Order does not comply with Local Rule 7.6.1. All orders in
	Pers.Serv.		succession, is to:				probate matters must be
	Conf. Screen						complete in themselves. Orders shall set forth all matters ruled on
✓	Letters 1/19	/11	Robert James Sai	ntopriet	ro, Jr		by the court, the relief granted,
	Duties/Supp		100%				and the names of persons,
	Objections						descriptions of property and/or
	Video						amounts of money affected with the same particularity as required
	Receipt						of judgments in general civil
	CI Report						matters. Monetary distributions
✓	9202						must be stated in dollars, and not
✓	Order						as percentages of the estate.
	Aff. Posting					Rev	viewed by: KT
	Status Rpt					Rev	viewed on: 5/8/12
	UCCJEA					Up	dates:
	Citation					Red	commendation:
√	FTB Notice					File	e 5 – Santopietro

Atty Fanucchi, Edward L. (for Petitioner/Administrator Mark Lugo)

(1) First and Final Account and Report of Personal Representative, Petition for Settlement, (2) Release of Funds on Deposit with the County of Fresno, (3) for Allowance of Statutory Commission, Ordinary and Extraordinary Attorneys' Fees, Costs, and (4) for Final Distribution (Prob. C. 11623)

DOD: 3/4/2006	MARK LUGO, Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS
DOD: 0/4/2000	MARK 1090, Administrator, is perinorier.	
	Account period: 3/4/06 – 2/23/02	Need proof of service of the Notice of
Cont. from	Accounting - \$44,116.40	Hearing and a copy of
Aff.Sub.Wit.	Beginning POH - \$40,144.89	the Petition on the
	Ending POH - \$44,116.40	Department of Health
√ Verified		Services pursuant to
√ Inventory	Administrator- \$1,764.66 (statutory)	their Request for
✓ PTC	Attorney - \$1,764.66 (statutory)	Special Notice. 2. Petition states that one
√ Not.Cred.	Alleres V/O 61 1/0 00 / !least alle	of the heirs of the
✓ Notice of Hrg	Attorney X/O - \$1,160.00 (per itemization, 6.4 hours @ \$200/hr)	estate was confined to
✓ Aff.Mail W	Petitioner states after the death of Richard Lugo,	a prison or facility under the jurisdiction of
Aff.Pub.	Integrated Lender Services foreclosed on the	the Pinal County Adult
	decedent's real property for non-payment of the	Detention in Florence,
Sp.Ntc. X	mortgage to the lend. The property was then	Arizona however the
Pers.Serv.	sold at a Trustee's Sale. On 12/12/07, Integrated	petition does not
Conf.	Lender Service deposited with the Fresno County	indicate whether or not
Screen	Clerk the net proceeds from the sale in the	notice to the Director
✓ Letters 2/9/11	amount of \$40,144.89. The funds remain on	of Victims
Duties	deposit with the County of Fresno. The	Compensation and
Objections	Administrator petitions the Court for release of those funds to pay creditors, costs of	Government Claims
Video	administration and distribution to heirs.	Board was performed
Receipt	dariii iisii alion ana aisiiibolion to neiis.	pursuant to Probate
CI Report	Distribution, pursuant to intestate succession, is	Code §216 and
√ 9202	to:	9202(b).
Order X	, · · ·	3. Petition does not
	Department of Health Service (in satisfaction of	
	their creditor's claim)	contain a statement
	- \$29,192.92	regarding if notice to the Franchise Tax
	Richard Lugo, III - \$2,684.72	Board was performed,
	Mark Lugo - \$2,684.72	as required by Probate
	Lorraine Serna - \$ 894.61	Code 9202(c)(1).
	Sandra Serna - \$ 894.61	4. Need Order
Aff. Posting	Tony Serna - \$ 894.61	Reviewed by: KT
Status Rpt	,	Reviewed on: 5/8/12
UCCJEA	1	Updates:
Citation	1	Recommendation:
FTB Notice X	1	File 6 - Lugo
	<u> </u>	· · g ·

Atty Kruthers, Heather H. (for Public Administrator – Petitioner)

(1) First and Final Account and Report of Administration and (2) Petition for Allowance of Ordinary and Extraordinary Commissions and Fee and for (3) Distribution [Prob. C. 10800, 10810, 10951, 11600, 11850(a)]

T		_		00, 10810, 10951, 11600, 11850(a	1
DC	D: 12/07/08	PUBLIC ADMINISTR	ATOR, A	Administrator, is Petitioner.	NEEDS/PROBLEMS/CO
		Account pariad: 0	0/1//11	03/08/13	MMENTS:
		Account period: 0	2/10/11		1. Need Receipts from
		Accounting	_		Sharon Tuttle and
Co	ont. from	Beginning POH	_	\$135,000.00	Edgar Tuttle for the
	Aff.Sub.Wit.	Beginning POH Ending POH	-	\$31,240.35	preliminary
√	Verified	1			distribution of
✓	Inventory	Administrator	-	\$4,780.00 (statutory)	\$5,000.00.
√	PTC	=		64 646 66 / J	
√	Not.Cred.	Administrator x/o	-	\$1,248.00 (ok per Local	
√	Notice of	Rule)			
	Hrg	Attorney	_	\$4,780.00 (statutory)	
√	Aff.Mail w/	· ·		Ţ :,, 20122 (0.0.0.0.)	
	Aff.Pub.	Bond Fee	-	\$337.50 (ok)	
	Sp.Ntc.			*** ***	
	Pers.Serv.	Costsand certification of	- of Lottor	\$866.50 (for filing fees,	
	Conf.		n Lenei	5)	
	Screen	Closing	_	\$1,000.00	
	Letters 02/16/1	_		• •	
	Duties/Supp	Petitioner states th	•	minary distributions have	
	Objections	been made as foll			
	Video	Sharon Tuttle			
	Receipt	Edgar Tuttle		\$5,000.00 n the amount of \$5,000.00	
	CI Report			e Tuttle, however, it was	
✓	9202	learned that she filed bankruptcy, therefore			
✓	Order	Petitioner has retained her check.			
	Aff. Posting				Reviewed by: JF
	Status Rpt	Distribution, pursuo	ant to in	testate succession, is to:	Reviewed on:
		Sharon Tuttle		\$6,076.12	05/08/12
	UCCJEA	Edgar Tuttle			Updates:
	Citation	Denise Tuttle		\$6,076.12*	Recommendation:
✓	FTB Notice			Denise Tuttle's bankruptcy	File 7 - Tuttle
		trustee, James Sal	ven, she	e may not receive	
				e and her distribution	
		•		etitioner also intends to	
		Salven.	JU.UU pr	eliminary distribution to Mr.	
		Sulven.			
<u> </u>					

8

Streett, John R. (for Petitioner Andrew Chaffer)

Petition for Removal of Trustee, Account, and for Appointment of Successor Trustee

			30CCESSOI IIOSIEE	W
			ANDREW CHAFFER, trust beneficiary, is	NEEDS/PROBLEMS/
			petitioner.	COMMENTS:
			Petitioner states he is the grandson and 1/6	Continued from 4/9/12. Minute order
	nt. from 121211,		beneficiary under the HARLEY E. CHAFFER TRUST	states Doug Chaffer is
022	712, 040912		executed May 9, 1991. Petitioner states he	ordered to send 2/11
	Aff.Sub.Wit.		does not possess a copy of the Trust. And	and 3/11 bank
1	Verified		amendment to the Trust was executed on October 29, 1998.	statements to Mr.
	Inventory		OCIODEI 27, 1776.	Streett. Mr. Chaffer is
	Inventory		Harley E. Chaffer died on March 4, 2011 thereby	also ordered to send any life insurance
	PTC		making the Trust irrevocable.	information to Mr.
Щ	Not.Cred.		making the host life vocable.	Streett.
/	Notice of Hrg		Petitioner is informed and believes that the	
			successor Trustee is DOUGLAS EDWARD	
1	Aff.Mail	W/	CHAFFER.	
	Aff.Pub.		OHAT ER.	1. Need proposed
	Sp.Ntc.		Petitioner alleges:	order.
	Pers.Serv.		The Trustee has violated his duty to inform	
	Conf. Screen		the beneficiaries and has refused to provide	
	Letters		Petitioner with a copy of the Trust, despite	
			written requests.	
	Duties/Supp		2. The Trustee has violated his duty to Petitioner	
	Objections		as Trustee has failed to ever render an	
	Video		accounting despite written request to do so.	
	Receipt			
	CI Report		Wherefore, Petitioner prays for an Order:	
	9202		• •	
		Χ	1. Compelling Douglas Edward Chaffer to	
	Aff. Posting		produce a copy of the Harley E. Chaffer	Reviewed by: KT
	Status Rpt		Trust of May 9, 1991 and all amendments to	Reviewed on: 5/7/12
	UCCJEA		it;	Updates:
\parallel	Citation		2. Compelling Douglas Edward Chaffer to	Recommendation:
	FTB Notice		account fully for all Trust property;	File 8 - Chaffer
			3. Removing Douglas Edward Chaffer as	
			Trustee;	
			4. Appointing a new Trustee as prescribed by	
			the Trust;	
			5. For costs of suit; attorney fees and for such	
			other and further relief as the court deems	
			proper.	

Brenda Ruth Scott (Estate)

Case No. 11CEPR01103

Atty Motsenbocker, Gary L. (for Michelle Scott – Administrator with Will Annexed/Respondent) Atty

Fanucchi, Edward L. (for Will Scott, Jr. – Contestant/Petitioner)

Will Contest and Petition of Will Scott Jr. to Revoke Probate or Purported Holographic Will (Probate Code 8270, et seq)

DO	D: 10/22/11	
ငိ	nt. from	
	Aff.Sub.Wit.	
✓	Verified	
	Inventory	
	PTC	
	Not.Cred.	
	Notice of	Х
	Hrg	
	Aff.Mail	Х
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf.	
	Screen	
	Letters	
	Duties/Supp	
	Objections	
	Video	
	Receipt	
	CI Report	
	9202	
	Order	Х
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	

MICHELLE SCOTT ("Respondent"), daughter, was appointed as Administrator with Will Annexed on 02/02/12 and decedent's holographic Will was admitted to Probate.

WILL SCOTT, JR., husband, is Contestant/Petitioner, and states that he was married to the decedent at the time of her death and would, by the laws of intestacy, take a portion of decedent's estate if the purported Holographic Will is revoked. Probate of the purported Holographic Will will substantially impair and diminish Petitioners right to decedent's estate because it purports to disinherit him. Petitioner alleges that probate of the purported Holographic Will should be denied on the following grounds:

- 1. On the date of the alleged execution of the purported Holographic Will, Decedent lacked testamentary capacity due to her age, physical and mental condition, and undue influence.
- 2. The purported Holographic Will is not a valid holographic will in conformity with the law, in that, among other things, its material terms are not entirely in the decedent's own handwriting and/or it is not signed by the Decedent.
- 3. On or before the date of the alleged execution of the purported Holographic Will, Respondent unreasonably held a deep resentment and animus toward Petitioner. Respondent gained Decedent's trust and confidence and, due to her age and mental and physical deficits, was able to exert her influence and control over Decedent to the extent that Decedent would do whatever Respondent suggested that she do.

Continued on Page 2

NEEDS/PROBLEMS/COMMENTS:

- 1. Need Notice of Hearing and proof of service by mail at least 15 days before the hearing to all interested parties pursuant to PrC § 1042.
- 2. Need proof of service of Summons with a copy of the Will Contest and Petition of Will Scott, Jr. to Revoke Probate of **Purported Holographic Will** pursuant to PrC § 8250.
- 3. Need Order.

Reviewed by: JF **Reviewed on:** 05/10/12 **Updates: Recommendation:** File 9 - Scott

9 Brenda Ruth Scott (Estate)

Page 2

4. Taking advantage of this trust, confidence and control, Respondent turned the Decedent against Petitioner, which would not have happened in the absence of Respondent's malevolent influence and suggestion, and the purported Holographic Will was not the natural result of the uncontrolled will of the Decedent, but rather, represented the will of the Respondent and a manifestation of Respondent's hatred of Petitioner.

Case No. 11CEPR01103

- 5. The Purported Holographic Will does not follow the Decedent's own will, which would naturally lead her to devise and bequeath all of her estate to all of her heirs;
- 6. Decedent was not acting voluntarily or freely at the time of the making of the Holographic Will and Decedent was not at that time of sound mind or capable of making a testamentary disposition of her estate.
- 7. The purported Holographic Will provides for an unnatural disposition of decedent's estate and unduly benefits Respondent.
- 8. Decedent did not intend for the purported Holographic Will to be operative or a testamentary disposition of her estate in the event of her natural death, it being conditioned on Decedent experiencing an "untimely death". Decedent's death was not untimely or unnatural.

Petitioner prays for an Order:

- 1. That the purported Holographic Will be denied probate; and
- 2. That the Petitioner be awarded his costs of suit.

Case No. 12CEPR00310

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

	1 IALA (1100. C. 0002, 10430)	
		NEEDS/PROBLEMS/COMMENTS:
		Confined to 5/21/20 :::
Cont. from		Continued to 5/16/12 at the
Aff.Sub.Wit.		request of the attorney.
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: KT
Status Rpt	_	Reviewed on: 5/7/12
UCCJEA	_	Updates:
Citation		Recommendation:
FTB Notice		File 10 – Hays

Atty Georgouses, Thomas J.

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

		NEEDS/PROBLEMS/COMMENTS:
		Continued to 5/16/12 at the
Cont. from		request of the attorney.
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: KT
Status Rpt		Reviewed on: 5/7/12
UCCJEA	_	Updates:
Citation		Recommendation:
FTB Notice		File 11 - Hays

In Re: Hailie L. Whitmire Special Needs Trust Case No. 10CEPR01092 Lederman, Gregory J. (of Woodland Hills, for Petitioner Comerica Bank & Trust, proposed Trustee)

Status Hearing Re: First Accounting

	COMERICA BANK & TRUST, N.A.	NEEDS/PROBLEMS/COMMENTS:
	(Claudia Schoemann, Trust Officer),	
	Petitioned the court for the	
	establishment of the Hailie L.	
Cont. from	Whitmire Special Needs Trust.	Need first account or current status report.
Aff.Sub.Wit.		
Verified		
Inventory	Pursuant to Schedule A of the Trust,	
PTC	the Trust was initially funded with: 1. \$1,024,874.58;	
Not.Cred.	2. Structured settlement annuity in	
Notice of	the amount of \$1,000,000.00 with	
Hrg	the following payment schedule:	
Aff.Mail	a. \$2,266.19 for life,	
Aff.Pub.	guaranteed at 25 years,	
Sp.Ntc.	beginning on June 1, 2011;	
Pers.Serv.	3. Structured settlement annuity in	
Conf.	the amount of \$300,000.00 with	
Screen	the following payment schedule:	
Letters	1. \$555.50 for life, guaranteed	
Duties/Supp	for 25 years, beginning June 1, 2011.	
Objections	Jone 1, 2011.	
Video	This status hearing was set at the	
Receipt	time the Special Needs Trust was	
CI Report	approved.	
9202	_	
Order		
Aff. Posting		Reviewed by: KT
Status Rpt	_	Reviewed on: 5/9/12
UCCJEA	_	Updates:
Citation	_	Recommendation:
FTB Notice		File 12 - Whitmire

13 Thanh Binh Vo (GUARD/P)

Atty

Atty

Case No. 09CEPR00484

Doan, Mark Son-Hoa (pro per Petitioner/Guardian)
Vo-Doan, Tien Hong (pro per Petitioner/Guardian)

Status Re: Transfer to LA County

Age: 10 years	MARK SON-HOA DOAN and	NEEDS/PROBLEMS/COMMENTS:
DOB: 4/22/02	TIEN HONG VO-DOAN,	
	maternal uncle and maternal	OFF CALENDAR Receipt of
	aunt were appointed	OFF CALENDAR. Receipt of Transfer received from Los Angeles
	successor guardians on	County on 5/10/12.
Cont. from	7/27/11.	
Aff.Sub.Wit.	// _/ /	
Verified	On 1/9/12 the Court granted	
Inventory	On 4/9/12 the Court granted	
PTC	Guardians, Mark So-Hoa Doan	
Not.Cred.	and Tien Hong Vo-Doan	
Notice of	petition to transfer the	
Hrg	proceedings to Los Angeles	
Aff.Mail	County.	
Aff.Pub.		
Sp.Ntc.	The file was transferred to Los	
Pers.Serv.	Angeles County on 5/2/12.	
Conf.	, angeres essent, sin e, 2, 12.	
Screen	This status hearing was set for	
Letters		
Duties/Supp	the Receipt of Transfer.	
Objections		
Video		
Receipt	_	
CI Report	_	
9202	_	
Order	4	Daviewed by KT
Aff. Posting	4	Reviewed by: KT
Status Rpt UCCJEA	-	Reviewed on: 5/7/12
Citation	4	Updates: Recommendation:
FTB Notice	=	File 13 - Vo
FIB NOIICE		THE 13- VU

14 Carribbean Thomas, Camora Foster and Craig Foster (GUARD/P)

Case No. 10CEPR01078

Atty Pennington, Gloria (pro per – maternal great-grandmother/Guardian)

Atty Thomas, Patricia (pro per – mother/Petitioner)

Petition for Termination of Guardianship

	rribbean, 13 B: 12/18/98		PATRICIA THOMAS, mother, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	mora, 4 0B: 06/11/07		GLORIA PENNINGTON , maternal great-grandmother, was appointed as Guardian of Carribbean and Camora on 05/16/11.	Note: Shacola Thomas was appointed as Guardian of sibling Craig Foster on 06/27/11. This Petition for termination pertains to Carribbean and Camora only.
Со	nt. from		Father: CRAIG FOSTER	Need Notice of Hearing.
	Aff.Sub.Wit.			2. Need proof of service by mail
✓	Verified		Paternal grandparents: UNKNOWN	at least 15 days before the
	Inventory		Maternal grandfather: MARCUS THOMAS	hearing of Notice of Hearing with a copy of the Petition for
	PTC		Maternal grandmother: ALLENE TURNER	Termination or Consent and
	Not.Cred.		<u> </u>	Waiver of Notice <u>or</u> Declaration of
	Notice of	Х	The Petition is incomplete and does not	Due Diligence for:
	Hrg		state a reason that termination is being	- Gloria Pennington (Guardian) - Craig Foster (father)
	Aff.Mail	Χ	sought.	- Marcus Thomas (maternal
	Aff.Pub.		Court Investigator Dina Calvillo filed a	grandfather)
	Sp.Ntc.		report on 05/08/12.	- Allene Turner (maternal
	Pers.Serv.			grandmother) - paternal grandparents
	Conf.			(unknown)
	Screen			- Carribbean (minor)
	Letters			
	Duties/Supp			
	Objections			
	Video			
	Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			Reviewed by: JF
	Status Rpt			Reviewed on: 05/09/12
<u> </u>	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 14 – Thomas & Foster

14

15 Jesse R. Trask (GUARD/PE)

Case No. 11CEPR01084

Atty Reinhardt, Mavis Jean (Pro Per – Maternal Grandmother – Guardian)

Atty Reinhardt, Alan William (Pro Per – Maternal Step-Grandfather – Guardian)

Status Hearing Re: Receipt of Blocked Account

Age: 7					
DOB: 1-16-05					
Cont. fron	n 032612				
Aff.Su	ub.Wit.	1.			
Verifi	ied				
Inven	itory				
PTC					
Not.C	Cred.				
Notic	e of				
Hrg					
Aff.N	lail				
Aff.P	ub.				
Sp.Nt	c.				
Pers.	Serv.				
Conf.	Screen				
Lette	rs				
Dutie	s/Supp				
Objec	ctions				
Video)				
Recei	pt				
CI Re	port				
9202					
Orde	r 📗				
-	osting				
Statu					
UCCJ	EA				
Citati					
FTB N	lotice				

MAVIS JEAN and ALAN WILLIAM REINHARDT, Maternal Grandmother and Step-Grandfather, were appointed Co-Guardians of the Person and Estate of Jesse R. Trask on 2-9-12 with all funds ordered to be placed in a blocked account.

The original petition stated Jesse's mother, who passed away in January 2011, had a life insurance policy through her employer (County of Fresno) that was estimated at between \$10,000.00 and \$20,000.00, and Petitioners have been instructed by the insurance company to place the funds into a blocked account.

The Court set this status hearing for receipt of funds in blocked account.

NEEDS/PROBLEMS/COMMENTS:

Continued from 3-26-12

<u>Note</u>: Examiner met with the Guardian after the last hearing to explain the process:

Please note that the Letters issued 2-16-12 do not authorize the Guardians to take possession of money or property without specific court order; however, the Order to Deposit Money Into Blocked Account filed 2-9-12 is the specific court order that authorizes "all funds" to be deposited into a blocked account.

The Letters, together with that Order, allows Guardians to obtain the funds to place into the blocked account. The Guardians were provided a blank copy of the Receipt Form (MC-356) for the bank to sign upon deposit. As of 5-9-12, the Receipt has not been filed.

1. Need receipt of funds in blocked account.

Reviewed by: skc

Reviewed on: 5-9-12

Updates:

Recommendation:

File 15 - Trask

15

Saiz, Linda (pro per – maternal great aunt/Petitioner)

Case No. 12CEPR00236

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 1 DOB: 04/18/11			NO TEMPORARY REQUESTED	NEEDS/PROBLEMS/COMMENT	
	7B. U4/10/11		LINDA SAIZ, maternal great aunt, is Petitioner.	1.	Need Notice of Hearing.
Co	ont. from		Father: JHONNY SALAMON – Declaration of Due Diligence filed 03/13/12	2.	Declaration of Due Diligence filed 03/13/12 states that the father's whereabouts are
✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓	Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail Aff.Pub. Sp.Ntc.	×	Mother: VERONICA CABALLERO – Consent & Waiver of Notice filed 03/13/12 Paternal grandparents: UNKNOWN – Declaration of Due Diligence filed 03/13/12 Maternal grandfather: JORGE CABALLERO Maternal grandmother: MONICA ORELLANA – Consent & Waiver of Notice filed 03/13/12 Siblings: VICTOR MURRILLO (4), MARIAH MURRILLO (2) Petitioner states that Niko has lived with her since birth. The mother stated that she was unable to care for him and asked her if she would raise him. Court Investigator Jennifer Young's report was filed 05/04/12.	3.	unknown and he has not been seen since the mother became pregnant. He told the mother that he was from Oaxaca, Mexico and was in the U.S. illegally. It is unknown if he is still in the area. If diligence is not found, need proof of personal service at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Guardian of the Person or Consent and Waiver of Notice for: - Jhonny Salamon (father) Need proof of service by mail at least 15 days before the hearing with a copy of the Petition for Appointment of Guardian of the Person or Consent and
→	9202 Order				Waiver of Notice or Declaration of Due Diligence for: - Jorge Caballero (maternal grandfather) - Paternal grandparents — unless diligence is found, Declaration of Due Diligence filed 03/13/12 states that they are unknown.
✓	Aff. Posting Status Rpt UCCJEA Citation FTB Notice			Re Up	eviewed by: JF eviewed on: 05/09/12 odates: ecommendation: e 16 - Caballero

17 Sydney J. Benlien (GUARD/P)

Atty Thomas, Andrea L (pro per Petitioner/Aunt)

Petition for Appointment of Temporary Guardian of the Person (Prob. C. 1510)

Age: 12 years			GENERAL HEARING 7/3/12	NEEDS/PROBLEMS/COMMENTS:
DOB: 3/21/2000				
			ANDREA L. THOMAS, aunt, is petitioner.	
			ANDREA E. IIIOMAO, GOIII, IS PERMONEI.	
			Father: DANIEL K. BENLIEN –	
Co	ont. from Aff.Sub.Wit.		declaration of due diligence filed on	
	Verified		4/30/12.	
✓			Mother: JACQULINE BENLIEN –	
⊫	Inventory		personally served on 5/4/12.	
	PTC Not Cred		Paternal grandfather: Deceased	
<u> </u>	Notice of		Paternal grandmother: Juanita	
√	Hrg		Hendryx	
1	Aff.Mail	W/	Maternal grandfather: Larry Thomas – consents and waives notice.	
Ě	Aff.Pub.		Maternal grandmother: Shari Sherman	
	Sp.Ntc.		The second of th	
1	Pers.Serv.	W/	Minor: Sydney J. Benlien – consents and waives notice.	
1	Conf.			
	Screen		Petitioner states the father's	
✓	Letters		whereabouts are unknown. Father had full custody and mother only had	
✓	Duties/Supp		supervised visits. Both parents have	
	Objections		drinking problems.	
	Video			
\Vdash	Receipt			
\Vdash	CI Report			
	9202 Order			
√				Davis was discuss MT
\parallel	Aff. Posting Status Rpt	<u> </u>		Reviewed by: KT Reviewed on: 5/9/12
 	UCCJEA			Updates:
 	Citation	<u> </u>		Recommendation:
	FTB Notice			File 17 - Benlien
<u> </u>	י וט וזטווכב			THE IT - DETINIEN

17

Case No. 12CEPR00385

Kylee Rose Hernandez (GUARD/P)

18

Atty

Case No. 12CEPR00393 Greer, Myrna (pro per – maternal grandmother/Petitioner)

Greer, Larry (pro per – maternal grandfather/Petitioner) Atty

Petition for Appointment of Temporary Guardian of the Person (Prob. C. 2250)

_	je: 8		GENERAL HEARING 07/05/12	NEEDS/PROBLEMS/COMMENTS:
DOB: 09/26/03			MYRNA GREER and LARRY GREER,	Need Notice of Hearing.
			maternal grandparents, are Petitioners.	Declarations of Due Diligence
Co	ont. from		Father: UNKNOWN – Declaration of Due Diligence filed 05/08/12	filed re mother and father states that the father is
	Aff.Sub.Wit.		Diligerice filed 03/06/12	unknown and the mother's
✓	Verified		Mother: CRYSTAL GREER - Declaration	current whereabouts are
	Inventory		of Due Diligence filed 05/01/12	unknown, and she has not been seen since May 2011. If
	PTC		Paternal grandparents: UNKNOWN	diligence is not found, need
	Not.Cred.		· ·	proof of personal service at
	Notice of	Х	Siblings: NATHANIEL DIAZ (14) – Consent	least 5 court days before the
	Hrg Aff.Mail		& Waiver of Notice filed 05/08/12 ANISSA JIMENEZ (5)	hearing of Notice of Hearing with a copy of the Petition for
	Aff.Pub.		GABRIEL JIMENEZ (4)	Appointment of Temporary
	Sp.Ntc.			Guardian of the Person <u>or</u>
	Pers.Serv.	Х	Petitioners state that Kylee has lived with them since December 2010. They	Consent and Waiver of Notice or:
✓	Conf.		have enrolled her in school and	- Crystal Greer (mother)
	Screen		provided for all of her needs. Petitioners	- father (unknown)
·/	Letters		would like to get medical and dental insurance for the minor and need a	
Ě	Duties/Supp Objections		guardianship to do so. Kylee's mother	
	Video		has not been seen or heard from since	
	Receipt		May 2011, she was last thought to be in jail in Las Vegas in February 2012.	
	CI Report		jan 11 203 vogas 11 1 001001 y 2012.	
	9202			
✓	Order			
\vdash	Aff. Posting			Reviewed by: JF
✓	Status Rpt UCCJEA			Reviewed on: 05/09/12 Updates:
	Citation			Recommendation:
	FTB Notice			File 18 – Hernandez

18

Kimble, Helana (pro per Petitioner/maternal grandmother)

Petition for Appointment of Temporary Guardian of the Person (Prob. C. 2250)

Case No. 12CEPR00390

Age: 3 years **NEEDS/PROBLEMS/COMMENTS:** Temporary Granted Ex Parte on 5/1/12 DOB: 2/15/2009 **TEMPORARY EXPIRES 5/14/12** 1. Need Notice of Hearing. **GENERAL HEARING 7/3/12** 2. Need proof of personal service, 5 court days prior to the hearing, of **HELANA KIMBLE**, maternal Cont. from the Notice of Hearing along with grandmother, is petitioner. Aff.Sub.Wit. a copy of the Temporary Petition or Consent and Waiver of Notice Verified Father: **JOHN POWELL** or Declaration of Due Diliaence Inventory on: Mother: LOUELLA DAVENPORT -**PTC** a. John Powell (father) Declaration of Due Diligence filed Not.Cred. b. Louella Davenport (mother) on 5/9/12. Χ Notice of if court does not dispense with Hrg notice. Paternal grandparents: Unknown Aff.Mail Maternal grandfather: Lee Powell 3. Confidential Guardian Screening Aff.Pub. form indicates the Petitioner was Sp.Ntc. charged with, arrested for, or **Petitioner states** the minor was Χ Pers.Serv. convicted of a crime deemed to dropped off by her daughter's Conf. be a felony or a misdemeanor friend with a black eye and the Screen without explaining. minor needs medical attention. Letters Also, Petitioner and the minor are **Duties/Supp** going to Evangel Home and **Objections** Petitioner needs paperwork stating Video she has guardianship in order for Receipt them to assist her with housing. **CI Report** 9202 / Order Aff. Posting Reviewed by: KT Reviewed on: 5/9/12 Status Rpt **UCCJEA Updates:** Citation **Recommendation:** File 19 - Palmer **FTB Notice**

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